

Altura Financial Planning Privacy Policy



Why do we need a Privacy Policy?

The Privacy Act requires us to have policies and procedures in place to cover the collection, use and disclosure of personal information we may hold about you. We always believe that your privacy should be protected and we will take every care in managing your personal information.

Altura Financial Planning has adopted a set of principles that demonstrate our commitment to privacy. We have set out these principles so that you are aware of how we gather, update and distribute personal information.

Information held

Altura Financial Planning only collect information that we feel is relevant to perform the activities necessary to pursue our duties, comply with legal requirements and maintain ourselves as a leading professional advisory firm. The nature of this information will vary according to your relationship with the firm and the work we are performing. Our objective is not to hold information about you that is not required to be held. We collect personal information about you for a variety of reasons, depending upon the particular company or division that you deal with in our group. Broadly, we require your information to be able accurately and effectively to provide you with the relevant service(s) that you have requested from us. This may include one or more of the following:

- Providing financial services and/or advice,
- Development of financial plans or strategies.

Some of the personal information we collect is necessary to meet the requirements of taxation, superannuation, corporation and/or family law.

What if you choose not to provide us with this information?

We only ask for information that is necessary for us to provide the service(s) that you request of us. Should you choose not to provide the information that we request, we may not be able to provide you with some of these services.

Access to this information

Upon written request to Altura Financial Planning, assuming there are no legal reasons preventing us from doing so, Altura Financial Planning will provide you with details of all personal information that we hold about you within a reasonable time period. You will be able to review this information and advise us of any amendments to the data held and may request Altura Financial Planning to delete any information held. Additionally, you may decline to take part in certain marketing activities in the future by expressly advising us in writing. We will apply your instructions as soon as it is possible to do so.

Use and disclosure of personal information to third parties

We only will provide personal information to third parties where we are required to by law, where it is reasonable for us to do so in the spirit of providing services to you (both within the business and via our relationship with third parties), where our advisers request it or where you have expressly asked us to do so. At times we may use this information for direct mailing, emailing, etc - purposes whereby we consider that the information supplied may be of benefit to you. We retain this information only for as long as necessary to fulfil our provision of services to you and to comply with any legal requirements.

Altura Financial Planning will not on-sell personal information to outside parties.

If you have any queries in relation to our privacy policy please contact 02 8776 0104.